Building and Sending Inventory Wizard Report
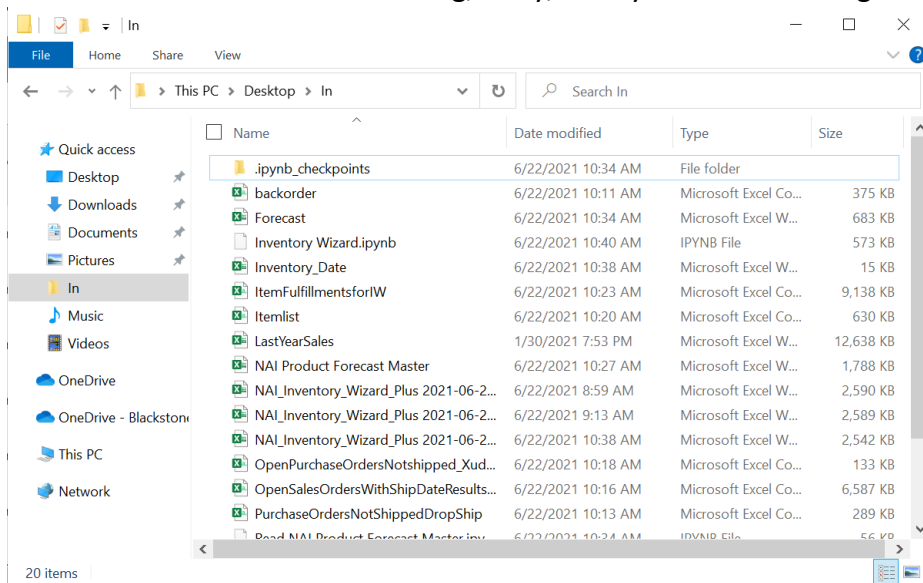
Pre-checks:
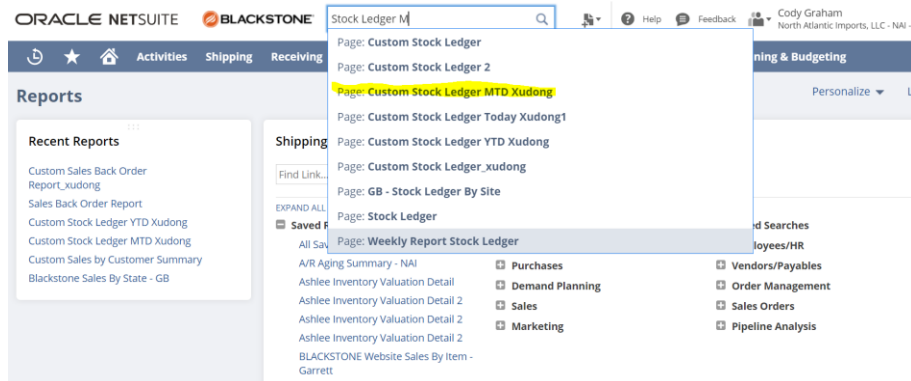
- Ensure that Anaconda Navigator is installed

- Gain access to NetSuite
- Obtain the "In" folder from Xudong, Cody, or anyone else who might have it

1. For each of the following reports (found in NetSuite), complete the following steps:
   a. Search the name of the report and select it

   b. Export the report - *some export buttons are found on the bottom right, and some are found on the top left.*

    c. Save the report as the corresponding report name in the "In" folder (replace it)

Reports:
Custom Stock Ledger MTD Xudong = stockledgerMonthTD
Custom Stock Ledger YTD Xudong = stockledgerYearTD
Shipments in Transit Xudong = ShipmentinTransit
Custom Sales Back Order Report Xudong = backorder
Purchase Orders - Not Shipped - Drop Ship-Xudong = PurchaseOrdersNotShippedDropShip
Open Sales Orders With Ship Datemainline=false Xudong = OpenSalesOrdersWithShipDateResultsmainline=false
Open Purchase Orders Not Shipped Xudong = OpenPurchaseOrdersNotshipped_Xudong
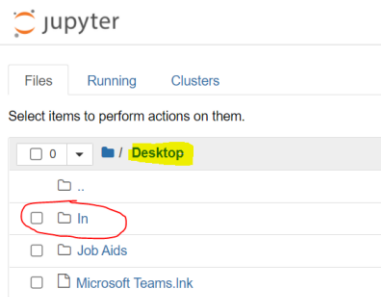Item List With Purchase Price Item = Itemlist
Item Fulfillments for IW Xudong = ItemFulfillmentsforIW
NAI Forecast Master *(save a copy, and delete all columns from EO (the blacked out column) onward)* = NAI Product Forecast Master

2. Open Anaconda Navigator → Jupyter Notebook, then do the following:
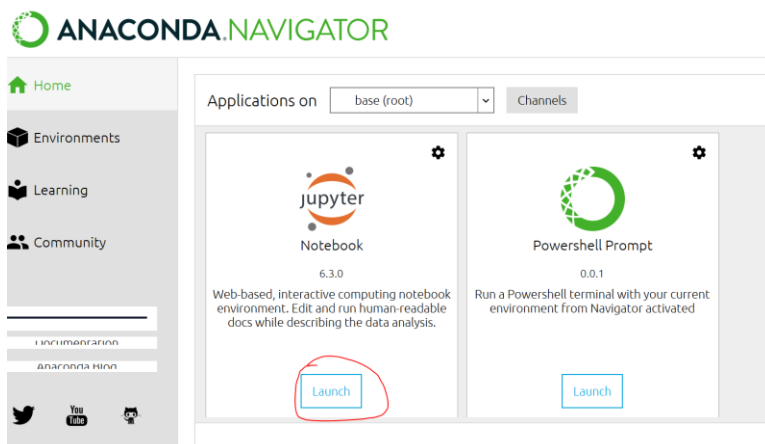
a. Select Desktop → In

b. Run "Read NAI Product Forecast Master"
    i. Click "Run" twice (for each block of code)
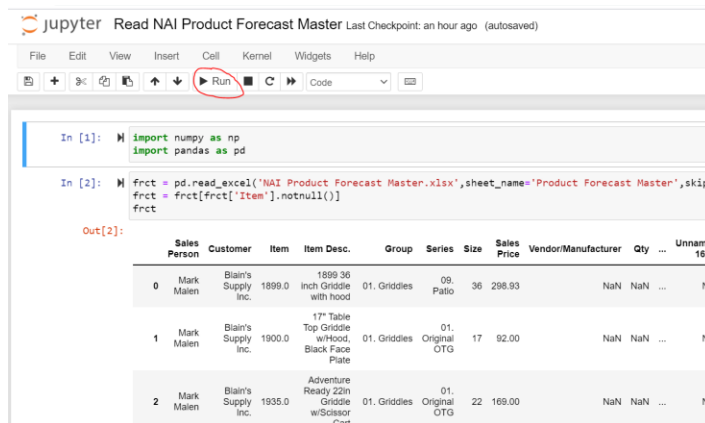
c. Wait for the hourglass symbol to become a book again:
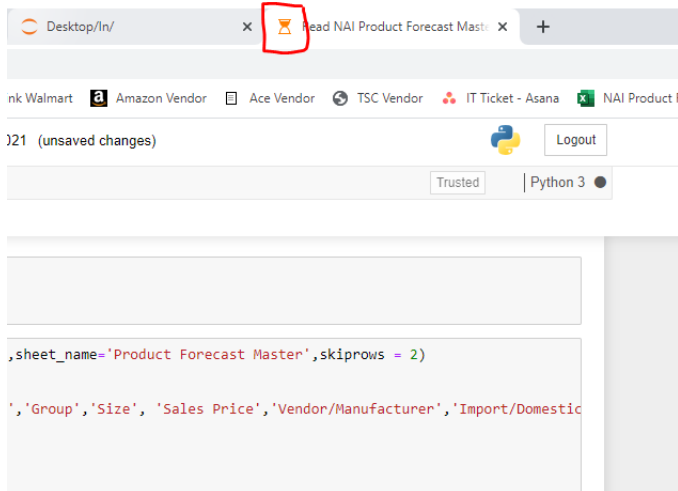
d. In the "In" folder (the one saved directly to the computer, not in Anaconda):
    i. Open "Forecast"
    ii. Sort "Forecast QTY" by largest to smallest
    iii. Delete all rows with blank, "-", or "TBD" values
    iv. Save "Forecast"
e. Back in Jupyter Notebook → Desktop → In:
    i. Run "Inventory Wizard_7.14.2021.ipynb" (could take up to 5 minutes to complete)

3. There will now be a file in the "In" folder found directly on your computer (not in Jupyter Notebook) called "NAI_Inventory_Wizard_Plus *YYYY-MM-DD*". Send this file along with the "Inventory_Date" file via email to the designated list of recipients.

Recipients as of 08/25/2021 (paste this list into the email):

allie@blackstoneproducts.com
amberk@blackstoneproducts.com
chris@blackstoneproducts.com
dunker@blackstoneproducts.com
christian@blackstoneproducts.com
davida@blackstoneproducts.com
awilson@blackstoneproducts.com
EHamilton@blackstoneproducts.com
Eric@blackstoneproducts.com
garrett@blackstoneproducts.com
Holley@blackstoneproducts.com
import@blackstoneproducts.com
Jake@blackstoneproducts.com
jaker@blackstoneproducts.com
james@blackstoneproducts.com
jminer@blackstoneproducts.com
jc@blackstoneproducts.com
Joyce@blackstoneproducts.com
Kati@blackstoneproducts.com
keaton@blackstoneproducts.com
kgreen@blackstoneproducts.com
kristin@blackstoneproducts.com
kyler@blackstoneproducts.com
Larissa@blackstoneproducts.com
mark@blackstoneproducts.com
melissa@blackstoneproducts.com
mjenkins@blackstoneproducts.com
mike@blackstoneproducts.com
mike.moser@blackstoneproducts.com
Nhansen@blackstoneproducts.com
Perry@blackstoneproducts.com
riley@blackstoneproducts.com
sarah@blackstoneproducts.com
scott@blackstoneproducts.com
seth@blackstoneproducts.com
ty@blackstoneproducts.com
tfullmer@blackstoneproducts.com
venessa@blackstoneproducts.com
vikki@blackstoneproducts.com
xudong@blackstoneproducts.com

Send "Current_Inventory_Status" separately to the list below (paste names and select "Check Names"):

Perry Jensen
Mark Malen
Chris Brown
Kjersti Green
Mike Midgley
Mike Moser
David Anderson
Michael Jenkins
James Coe
Vikki Pingle
Jake Rudd
Keaton Manwaring
Joyce Jensen

ON MONDAYS: Send "NAI_BS_Forecast_TR3_yyyy_mm_dd_time" separately to the list below:

Vikki Pingle
Jake Rudd
Keaton Manwaring
Joyce Jensen
Vladislav Nivorozhkin